


Creating and Viewing Provider Notes

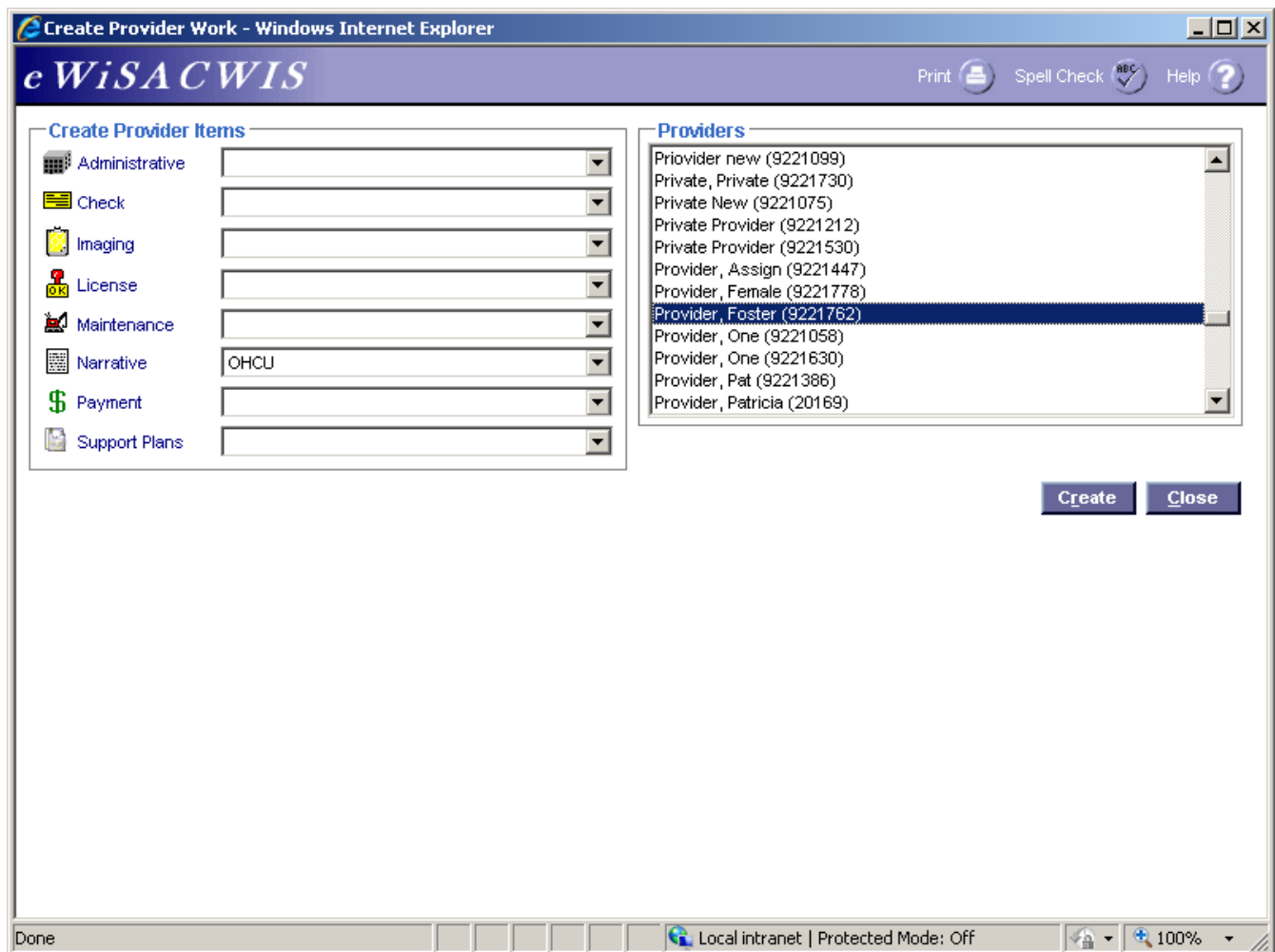
Note: In order to create a provider note, an assignment to the provider is not needed. Additionally, a provider note can be created on a closed provider record.

Creating Provider Notes on Assigned Cases

1. Create a provider note using one of two methods:

- a) From your desktop, click the Provider Work hot button . This will open the Create Provider Work page.

Select the Category from the Narrative drop-down and select the Provider. Click Create. This will open the Provider Note page.



Create Provider Work - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

Create Provider Items

- Administrative
- Check
- Imaging
- License
- Maintenance
- Narrative (OHCU)
- Payment
- Support Plans





Providers

- Provider new (9221099)
- Private, Private (9221730)
- Private New (9221075)
- Private Provider (9221212)
- Private Provider (9221530)
- Provider, Assign (9221447)
- Provider, Female (9221778)
- Provider, Foster (9221762)**
- Provider, One (9221058)
- Provider, One (9221630)
- Provider, Pat (9221386)
- Provider, Patricia (20169)

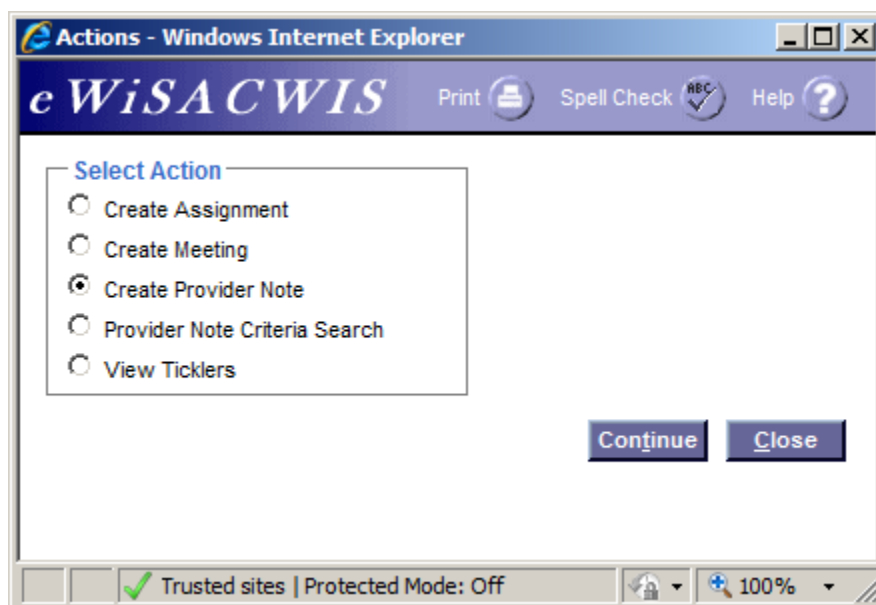
Create Close

Done Local intranet | Protected Mode: Off 100%

- b) From your desktop, click the Actions hyperlink next to your provider. This will open the Actions page.

	Provider, Assign (9221447)	Actions	
	Foster Home	12/07/2006	Cake, Caitlin M. (Supervisor) Des: Milwaukee License Status: Pending
	Provider, Female (9221778)	Actions	
	Foster Home	03/29/2012	Cake, Caitlin M. La Crosse Des: Milwaukee License Status: Modify
	Provider, Foster (9221762)	Actions	
	Foster Home	01/11/2011	Cake, Caitlin M. Brown Des: Milwaukee License Status: Revoked
	Provider, One (9221630)	Actions	
	Foster Home	04/14/2009	Cake, Caitlin M. Des: Milwaukee License Status: N/A

On the Actions page, select Create Provider Note and click Continue. This will open the Provider Note page.



2. At the top of the Provider Note page there is an option to search out the Worker Making Contact if it is not you (the person entering the Provider Note). Enter the Date, Begin Time, and the Type. Enter the Narrative. The Provider Note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked or 30 days have passed, the note will be frozen and no longer editable. Click Save to save your changes. The Create button creates a new Provider Note. The Clear Fields button will blank out all of the fields on this note. For the Insert Correction Note button, see the associated Creating Provider Correction Notes User Guide.

The screenshot shows a web browser window titled "Provider Note - Windows Internet Explorer". The page header features the "eWiSACWIS" logo and navigation links for "Print", "Spell Check", "REC", and "Help".

At the top of the form, there are three fields: "Provider: Provider, Foster (9221762)", "Worker Creating Note: Cake, Caitlin M.", and "Worker Making Contact: Cake, Caitlin M." with a "Search" link. Below these are "Provider Note ID:" and "Date Entered: 10/22/2012 04:17 PM", followed by a "Note Finalized" checkbox.

The "Note Information" section contains the following fields:


- Date: 10/01/2012
- Category: OHCU (dropdown menu)
- Begin Time: 08:00 (dropdown menu) with AM/PM radio buttons (AM is selected)
- Type: Licensing (dropdown menu)
- End Time: 00:00 (dropdown menu) with AM/PM radio buttons (PM is selected)
- Duration: 0000.0
- Billable checkbox (unchecked)

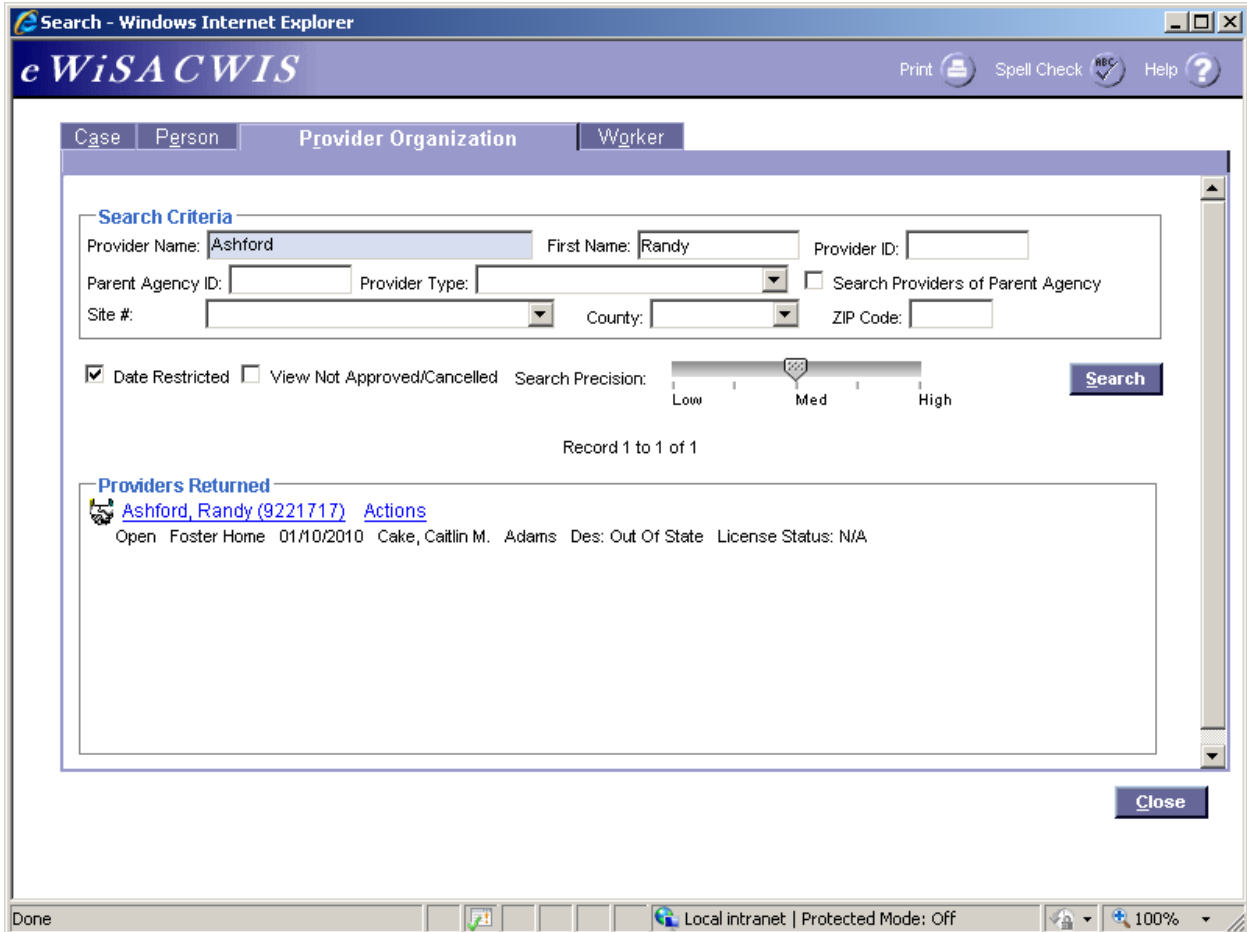
The "Narrative" section is titled "Provider Note 1/1" and contains a large text area with the placeholder text "provider note here...". Below the text area are links for "More...", "Less...", and "Default".

At the bottom of the form are five buttons: "Insert Correction Note", "Clear Fields", "Create", "Save", and "Close".

The browser's status bar at the bottom shows "Done", "Local intranet | Protected Mode: Off", and a zoom level of "100%".

Creating Provider Notes from Search

1. From your desktop, click the Search hot button . This will open the Search page. On the Search page, click on the Provider Organization tab to search the provider to add a note to. You do not need to be assigned to the provider, and the provider can be open or closed. Click the Actions hyperlink next to the provider name.



Search - Windows Internet Explorer

eWiSACWIS Print Spell Check ABC Help ?

Case Person **Provider Organization** Worker

Search Criteria

Provider Name: Ashford First Name: Randy Provider ID:


Parent Agency ID: Provider Type: ☐ Search Providers of Parent Agency

Site #: County: ZIP Code:

☒ Date Restricted ☐ View Not Approved/Cancelled Search Precision: Low Med High **Search**

Record 1 to 1 of 1

Providers Returned

 [Ashford, Randy \(9221717\)](#) [Actions](#)

Open Foster Home 01/10/2010 Cake, Caitlin M. Adams Des: Out Of State License Status: N/A

Close

Done Local intranet | Protected Mode: Off 100%

2. Select the Create Provider Note radio button and click Continue.



Actions - Windows Internet Explorer

eWiSACWIS Print Spell Check ABC Help ?

Select Action

☐ Create Meeting

☒ Create Provider Note

☐ Provider Note Criteria Search

☐ View Ticklers

Continue **Close**

Local intranet | Protected Mode: Off 100%

3. This opens the Provider Note page. Complete the required fields and click Save when finished.

The screenshot shows the 'Provider Note' page in a Windows Internet Explorer browser window. The page title is 'eWiSACWIS'. The top navigation bar includes 'Print', 'Spell Check', 'Help', and a 'Search' button. The main content area is divided into two sections: 'Note Information' and 'Narrative'. The 'Note Information' section contains fields for 'Date' (00/00/0000), 'Begin Time' (00:00 AM), 'End Time' (00:00 AM), 'Category' (dropdown), 'Type' (dropdown), 'Duration' (0000.0), and a 'Billable' checkbox. The 'Narrative' section contains a large text area with the placeholder text 'provider note here...'. Below the text area are links for 'More...', 'Less...', and 'Default'. At the bottom of the page are buttons for 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'. The status bar at the bottom indicates 'Local intranet | Protected Mode: Off' and '100%' zoom.

Provider Note - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

Provider: Ashford, Randy (9221717) Worker Creating Note: Cake, Caitlin M. Worker Making Contact: Cake, Caitlin M. [Search](#)

Provider Note ID: Date Entered: 10/22/2012 04:22 PM ☐ Note Finalized

Note Information

Date: 00/00/0000 Category:

Begin Time: 00:00 ☒ AM ☐ PM Type:

End Time: 00:00 ☐ AM ☐ PM Duration: 0000.0 ☐ Billable

Narrative

Provider Note 1/1

provider note here...

[More...](#) [Less...](#) [Default](#)

[Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

Done Local intranet | Protected Mode: Off 100%

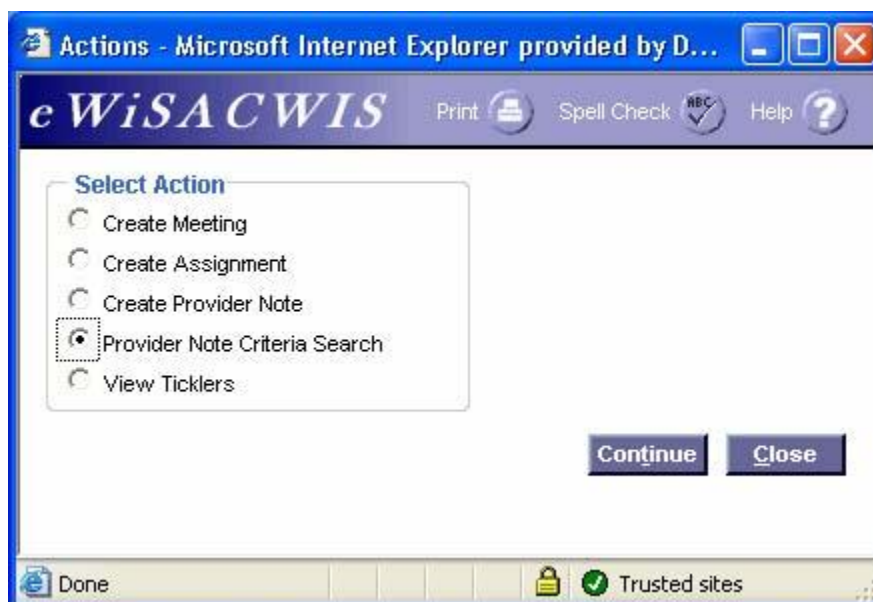
Note: Up until the day a provider note is finalized, a provider note can be updated via Search by either the Worker Creating Note or the Worker Making Contact.

Viewing Provider Notes

1. To view or print multiple notes for a provider from your desktop or from search, click the Actions hyperlink next to the provider name.



2. Select the Provider Note Criteria Search radio button and click Continue.



3. Enter the criteria for the notes to be viewed. Start Date, End Date, and at least one Category are required. Once all desired criteria is entered, click the Search button.

Note: The Start Date and End Date pre-fill to retrieve the past 30 days' worth of notes. These dates can be changed to retrieve a greater or lesser timeframe.

The screenshot shows a web browser window titled "Provider Note Search Criteria - Microsoft Internet Explorer provided by DHFS - State of Wisconsin". The page has a blue header with the "eWiSACWIS" logo and navigation links for Print, Spell Check, and Help. Below the header, the "Note Criteria" section contains input fields for "Provider: Abby, Alice", "Number: 9221110", "Start Date: 01/01/2000", and "End Date: 05/29/2009". A message states "Hold down the 'Ctrl' key for multi-selection". The "Category and Type Criteria" section features two lists: "Categories" and "Types". The "Categories" list includes Adoption, Correspondence, Fiscal, HFS38/56 Viol/Excpn, Kinship, OHCU, and Permncy Consultation. The "Types" list includes Adoption - Child Presentation, Adoption - Complaints, Adoption - E-mail, Adoption - Home Visit, Adoption - Licensing, Adoption - Office Visit, Adoption - Other, and Adoption - Provider Matching. Between these lists are four buttons: "Add >", "Add All>>", "< Remove", and "<< Remove All". A "Selected Categories" list on the right mirrors the "Categories" list. At the bottom right of the form are "Search" and "Close" buttons. The browser's status bar at the bottom shows "Done" and "Trusted sites".

Provider Note Search Criteria - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS Print Spell Check Help

Note Criteria

Provider: Abby, Alice Number: 9221110 Start Date: 01/01/2000 End Date: 05/29/2009

Hold down the 'Ctrl' key for multi-selection

Category and Type Criteria

Categories

- Adoption
- Correspondence
- Fiscal
- HFS38/56 Viol/Excpn
- Kinship
- OHCU
- Permncy Consultation

Selected Categories

- Adoption
- Correspondence
- Fiscal
- HFS38/56 Viol/Excpn
- Kinship
- OHCU
- Permncy Consultation

Types

- Adoption - Child Presentation
- Adoption - Complaints
- Adoption - E-mail
- Adoption - Home Visit
- Adoption - Licensing
- Adoption - Office Visit
- Adoption - Other
- Adoption - Provider Matching

Buttons: Add > Add All>> < Remove << Remove All Search Close

Done Trusted sites

- The notes returned can be sorted different ways by clicking the blue column labels like Date Entered, Category, Type, etc. To show notes only for a particular worker, select that worker from the Worker Name drop-down. To Print or View one provider note, select the appropriate hyperlink on the right. To view or print all retrieved notes at once, select Print All Notes from the Options drop-down and click 'Go.' This will open the notes in a Microsoft Word document. The New Search button will return you to the Provider Note Search Criteria page.

Provider Note Search Results - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS Print Spell Check Help

Note Criteria

Provider: Abby, Alice Number: 9221110 Start Date: 01/01/2000 End Date: 05/29/2009 Sorted by: Default

Records 1 to 3

Worker Name: All

Notes

PNID	Date/Time Occurred	Date Entered	Category	Type	Worker Name	Billable		
9221310	08/10/2006 10:00 AM	08/10/2006	Correspondence	Letter	Cake, Caitlin	No	Print	View
9221308	07/01/2006 10:00 AM	07/18/2006	OHCU	Home Visit	Cake, Caitlin	No	Print	View
9221286	10/10/2005 10:10 AM	03/14/2006	Correspondence	Letter	Cake, Caitlin	No	Print	View

Options:

Done Trusted sites

Quick View of Provider Notes from the Desktop

From your desktop (or from search), expand the provider, expand the Narrative icon, and then put your mouse cursor over the word (Details) to see the first 120 characters of that note. To view the entire note, click the hyperlink.

eWiSACWIS - Windows Internet Explorer

eWiSACWIS

Case Work Provider Work

Create Maintain Utilities Adoption Search Help

Jenny Weber's Desktop

☒ Date Restricted ☐ Participant View ☐ View Not Approved/Cancelled

Ticklers

Cases (32)

Providers (20)

- [ABC Shelter \(9221489\)](#) [Actions](#)
Group Home 01/08/2008 Weber, Jenny Dane
- [Detention Facility \(9221490\)](#) [Actions](#)
Other - Organization 01/08/2008 Weber, Jenny Dane
- [Provider, Female \(9221516\)](#) [Actions](#)
Foster Home 11/10/2009 Weber, Jenny Grant Des: State License Status: Active-Regular
- [Provider, Foster \(9221481\)](#) [Actions](#)
Foster Home 09/17/2007 Worker, State T., Jr. State Des: State License Status: Active-Regular

Assignments

Basic

Home Inquiries

Licenses

Members

Narrative

[OHCU - Licensing](#) (Details)
Supervisor, Test 10/14/2010 provider note here...

Parent Agency

Provider Services

Services

[Provider Home \(9221520\)](#) [Actions](#)